

P-CARD USER MANUAL.....	1
MAINTAINING CURRENT USERS.....	1
INTRODUCTION	1
MAINTAINING CURRENT USERS	1
USER INFORMATION	2
USER ROLES (OR SECURITY).....	3
P-CARD DETAILS	4
CHANGE THE DEFAULT PCA/INDEX AND ASSIGN APPROVAL PCA/INDEX.....	5
UPDATING A USER’S E-MAIL ADDRESS	6
INACTIVATING A USER.....	7

P-CARD USER MANUAL

MAINTAINING CURRENT USERS

INTRODUCTION

This document will describe how to locate users in P-Card and update their settings such as their role (or security), credit card information, default PCA/Index, or Approval PCA/Index. To have a card issued or cancelled, contact the Department of Administration, Division of Purchasing at 208.332.1612. For more details, see the [Department of Administration's FAQ Web page](#).

MAINTAINING CURRENT USERS

There are several ways to sort or find current P-Card users to check their status or edit their settings. By default, all users are shown in alphabetical order of the last name.

Figure 1 - Finding users

The screenshot shows the P-Card user management interface. At the top, there are navigation tabs: Reports, App Menu, Statewide Acct, Logoff, and a Back button. Below these are sub-tabs: Maintain Loc, Maintain PCA, Maintain CC, Add User, Agency Settings, Posted Pending, and Outstanding CC. A search section on the left has a 'Find users by name' label and a 'Last Name' input field with a 'Find' button. Above the input field is an alphabet list (A-Z) with 'All Users' selected. A red arrow points from the 'Find users by name' label to the 'Last Name' input field. Another red arrow points from the 'All Users' link to the alphabet list. A third red arrow points from the 'Invalid Index/PCA' label to the 'PCA/Index' column in the user list. The user list has columns: Edit, Last, First, Middle, Email, Holder, Active, Created, and PCA/Index. The first user listed is ANDERSON, MARILYN, with email manderso@phd7.state.id.us. The second user is TAMARA, with email tcox@phd7.state.id.us. The third user is KELLYE, with email leager@phd7.state.id.us. The PCA/Index values are 06830, 06810 (highlighted in red), and 04000 respectively. Filter options at the bottom include: All Roles, Admin, Verifier, Verifier All, Approver, Approver All, Auditor, Active, NonActive, and All Users.

Edit	Last	First	Middle	Email	Holder	Active	Created	PCA/Index
	ANDERSON	MARILYN		manderso@phd7.state.id.us	✓	✓	3/4/2005	06830
		TAMARA		tcox@phd7.state.id.us	✓	✓	2/11/2005	06810
		KELLYE	L	leager@phd7.state.id.us	✓	✓	3/4/2005	04000

To view a specific user or group of users you can do any of the following:

- From the alphabet list next to **All Users**, click the letter of the last name to view only those users.
- Type the **Last Name**, or part of the last name, of a user and click **Find**.
- Select the role/security. E.g., select **Approver** to view all users who are approvers or click **NonActive** to view all users who are not active in the P-Card application. You can select both a role and a status. For example, select **Verifier** and **Non Active** to view all NonActive users who were verifiers.

NOTE: If a user's default PCA or Index is invalid, the PCA/Index will be highlighted in red. This could mean that the PCA or Index is invalid for the current budget fiscal year. Transactions for a user with an invalid PCA would not be assigned fiscal codes in P-Card.

Once you have located the user, do the following:

1. Click the edit icon next to a user's name to modify their set up.

Figure 2 - Edit icon

The screenshot shows a web application interface for user management. At the top, there are navigation tabs: Reports, App Menu, Statewide Acct, Logoff, and a Back button. Below these are more specific tabs: Maintain Loc, Maintain PCA, Maintain CC, Add User, Agency Settings, Posted Pending, and Outstanding CC. A search bar for 'All Users' with an alphabetical index (A-Z) is present. A 'Find' button is next to a text input field for 'Last Name'. Below the search bar is a table of users with columns: Edit, Last, First, Middle, Email, Holder, Active, Created, and PCA/Index. The first user, ANDERSON, has an edit icon (a small square with a pencil) highlighted with a red circle. Other users listed are COX and EAGER.

2. The user's configuration screen will open.

The user configuration screen is essentially made up of four sections: the user information, user roles (or security), P-Card details, and default PCA/Index assignments.

Figure 1- User configuration

The screenshot shows the 'User configuration' screen for a user named HUMMDINGER. The screen is divided into several sections. The top right shows the 'Creation Date' as 4/17/2007. The main sections are:

- User information:** Fields for First Name (MISSES), Middle (R), Last Name (HUMMDINGER), and E-mail (ipopsjob@sco.idaho.gov). A checkbox for 'Active P-Card User' is checked. A red box highlights this section.
- User roles (or security):** A group of checkboxes for roles: Verifier, Verifier All, Admin, Approver, Approver All, and Auditor. A red box highlights this section.
- P-Card Details:** A section for 'Credit Cards' with a table for CC#, Active, and Description. There is an 'Add' button and a 'Save' button. A red box highlights this section.
- Default Index/PCA assignment:** A section for 'Choose Default PCA' with a table for Code and Description. A red box highlights this section.

Each section is described below.

USER INFORMATION

1. Verify the user information. If it is not correct, contact your payroll representative to make sure the user has been add to the state payroll properly.
2. Select **Active P-Card User** to give the user access to the P-Card application. Uncheck this to deny the user access to the application. NOTE: This does not cancel the actual P-Card or mean they cannot use the P-Card. It only affects the user's access to the P-Card application.

Figure 2 - User information

First Name	GAREC	<input checked="" type="checkbox"/> Active P-Card User
Middle		
Last Name	BARR	
E-mail	GBar@cdhd.idaho.gov	

USER ROLES (OR SECURITY)

User roles define what the user can do in the P-Card application.

Figure 3 - User roles (or security)

<input type="checkbox"/> Verifier	<input type="checkbox"/> Verifier All	<input type="checkbox"/> Admin
<input checked="" type="checkbox"/> Approver	<input type="checkbox"/> Approver All	<input type="checkbox"/> Auditor
<input type="text" value="2"/> Approver Level		

3. Select the approver, verifier, or administrator roles for the user. The options are:
 - **Verifier** - validates that the purchase recorded is valid and correct. For many agencies, the card holder is the Verifier. However, you can designate an alternate employee as a Verifier. Verifiers of multiple cards will be able to select transactions either by individual cardholder or group.
 - **Verifier All** – same functions as a Verifier but the Verifier All can verify transactions from all card holders.
 - **Approver** - approves the transmittal and the attached documentation for appropriateness of the expenditure, accuracy of the fiscal coding, etc. Approvers can approve transmittals for the level they are assigned and below. The final approver is the last approver of the transmittal before it is submitted to STARS. (Agencies must have at least one approval level.) NOTE: To restrict users from approving their own transactions at any approval level, select **Agency Settings** on the main Administrator screen and click **Restrict User** (this affects all users).
 - **Approver All** – same functions as an Approver but the Approver All can approve transmittals from all card holders.
 - **Admin** – gives a user full P-Card application administrator access.
 - **Auditor** – auditors can view transactions and transmittals but do not have any capability to verify, approve, add, or make changes to users. Auditors can run all reports.
4. Select the **Approval Level** when you select **Approver** or **Approver All**.

Each transmittal must be approved by each approval level. Thus, by assigning different approvers to different approval levels, you can help maintain internal controls for your business process.

P-CARD DETAILS

This section sets up the card holder, the P-Card, and proxy cards (if applicable). NOTE: The **Maintain CC** menu can perform some of the same functions. See the [Maintaining Credit Card and Proxy Verifier](#) documentation.

Figure 4 - P-Card information

CC#	Active	Description	Edit	Delete
123456	<input checked="" type="checkbox"/>	test card		
	<input type="checkbox"/>		Save	

Credit Card '000000' added to Proxy list.

Proxy Cards	CC#	Card Holder	
Add	Del	000000	DAVIS PAT

1. Select **Card Holder** if the user is the actual holder of the P-Card you are entering. (Leave blank if the user is a verifier or approver but not the card holder.)
2. To add a new card to a current user, enter the last six digits of the P-Card number in the **CC#** field. NOTE: Do not use a placeholder (e.g., 999999). Actual credit card numbers must be entered into the application.
3. Check the **Active** check box to make the card active in the P-Card application. Only one card can be active per user, although a user may have several card numbers assigned to them for approval or verification.
NOTE: If a card is lost or stolen, do not delete the card number. Leave the lost/stolen card active until all the transactions are received from Wells Fargo, and then change the card to inactive. If you delete the card, you will lose the transaction history in the P-Card application. [Click here for specific instructions.](#)
4. Enter a **Description** if desired.
5. Click **Save** next to the card information.
6. To add a proxy card number, enter the last six digits of the card number in the **Proxy Cards** field and click **Add**. The card number and card holder for whom the new user will be a proxy will be displayed. Adding the card number to the user makes the user a proxy verifier – this person can verify transactions on that card in place of the card holder.
NOTE: **Maintain CC** assigns existing P-Card users to a card whereas when you add or update an existing user to be a proxy verifier, you assign cards to the user. See [Maintaining Credit Cards and Proxy Verifiers](#) for more information.

CHANGE THE DEFAULT PCA/INDEX AND ASSIGN APPROVAL PCA/INDEX

NOTE: To make changes to the default PCA/Index or Assigned Approval PCA/Index for multiple users, use the **Maintain PCA/Index/Location** screen – you do not have to edit each individual user. See the [Maintaining Default or Assigned PCA, Index, Location Codes](#) documentation.

By changing a default PCA/Index/Location, any user currently assigned a given default PCA/Index/Location can be updated with a new default PCA/Index/Location. You can also view which users are currently assigned a given default PCA/Index or approval PCA/Index.

To update an individual user:

1. Select **Choose Default PCA** or **Choose Default Index** (the choice displayed depends on your agency structure) to assign a default PCA or Index to the card holder/card number.
2. Click **Select** next to the Index or PCA needed. The **Default PCA/Index** will be replaced.

Figure 5 - Default PCA/Index (this example shows a PCA)

Code	Description	Select
10900	DAILY DEPOSITS	Select
11100	ADMINISTRATION	Select
11120	VITAL STATISTICS	Select
11300	BOARD OF HEALTH	Select
11400	RESERVE	Select
12100	ADMIN SUPPORT SERVICES	Select

Default PCA: 11100 ADMINISTRATION

3. If setting up an Approver/Approver All, you can also select **Assign Approval PCA** or **Assign Approval Index** (the choice displayed depends on your agency structure).
4. Check the check box next to the PCAs or Indexes you want to assign to the approver.

Figure 6 – Select Approval PCA or Index

PCA	Description
<input checked="" type="checkbox"/> 31010	CEMETERY OPERATIONS
<input type="checkbox"/> 31013	ADMINISTRATION DIVISION-FEDERAL
<input checked="" type="checkbox"/> 31014	OWA/E.R. - FEDERAL
<input checked="" type="checkbox"/> 31015	COUNTY SERVICE OFFICER TRAINING FEDERAL
<input type="checkbox"/> 31016	VETERANS AFFAIRS COMMISSION FEDERAL

Default PCA: 51010 CEMETERY OPERATIONS

- Click the right arrow icon to assign the selected PCAs or Indexes. (To remove a PCA/Index, check the check box of an assigned PCA/Index and click the left arrow icon)

Figure 7 - Assign Approval PCA or Index

The screenshot shows a web interface for assigning approval PCAs. At the top, there are two tabs: 'Choose Default PCA' and 'Assign Approval PCA'. Below the tabs, there are two tables. The left table lists PCAs with checkboxes. The right table lists PCAs with checkboxes. A red circle highlights the right arrow button (>>) between the two tables. Another red circle highlights the left arrow button (<<) below the right table.

- After the user configuration is complete, click **Save** (on the top menu bar).

Figure 8 - Save user configuration

The screenshot shows a web interface for user configuration. At the top, there is a menu bar with buttons: 'Home', 'Acct', 'Logout', 'Back', and 'Save'. The 'Save' button is circled in red. Below the menu bar, there is a section for 'Credit Cards' with a 'Creation Date' of 7/31/2007. There is a checkbox for 'Active P-Card User' and a table for 'Credit Cards' with columns: CC#, Active, and Description. The table has one row with CC# 123456, Active checkbox, and Description P-Card. A 'Save' button is at the bottom right of the table.

UPDATING A USER'S E-MAIL ADDRESS

Administrators do not change a user's e-mail address. Each user updates his or her email address on the log on screen to Statewide Accounting Systems. When logging on, your user must click **Edit** next to their e-mail address, enter their correct address, and then click **Save**.

Figure 9 - Changing user e-mail address

The screenshot shows a web browser window with the URL 'https://pss.sco.idaho.gov - Email Address - Microsoft Inter...'. A dialog box is open with the title 'Email Address' and a text field containing 'sjaret@sco.idaho.gov'. There are 'Cancel' and 'Save' buttons. Below the dialog box, the user's email address 'sjaret@sco.idaho.gov' is displayed with an 'Edit' button next to it. The 'Edit' button is circled in red. The background shows a 'Welcome SAM JARRET' message and navigation links for P-Card, Cash Receipts, Payment Services, and Purchasing.

INACTIVATING A USER

If a P-Card user leaves your agency or is no longer a P-Card user, inactivate the user from the application.

1. Click the edit icon next to a user's name.
2. Click the check box next to **Active P-Card User** to clear it.
3. Leave the credit card **Active** until all transactions for the user have cleared. Do not delete the card. If there are proxy verifiers for the card, they will be able to see the transactions and verify them.
4. Click **Save** (on the top menu bar).

Figure 10 - Active P-Card User cleared

The screenshot displays the 'Credit Cards' management interface. On the left, a form contains fields for 'First Name' (State), 'Middle', 'Last Name' (Employee), and 'E-mail' (employee@idl.idaho.gov). A checkbox labeled 'Active P-Card User' is circled in red and is currently unchecked. Below these fields are checkboxes for roles: Verifier, Approver, Verifier All, Approver All, Admin, and Auditor. On the right, a table lists credit cards. The first row shows CC# 123456, which is active (checkbox checked) and has a description. The table includes 'Edit' and 'Delete' links for each entry. At the bottom right, there is a 'Save' button. The top right corner shows the 'Creation Date' as 8/15/2005.

CC#	Active	Description	
123456	<input checked="" type="checkbox"/>		Edit Delete
	<input type="checkbox"/>		Save

NOTE: When an employee leaves the state payroll and EIS updates their records to reflect this, the user will no longer be able to access *any* of the Statewide Accounting System applications even if they are still able to log on to the SCO Web site.